



### **Tips for Personal Visits with Members and Staff**

There is no better way to effectively make your case on issues with legislators and staff than personal visits. Such visits also are a good way to introduce yourself as a constituent. Personal meeting can be difficult to accomplish with the policymaker's busy schedule, but remember that you are offering an important business contact. You can arrange the meeting with the policymaker directly or through staff aides.

#### **Six Simple Rules for Personal Visits:**

1. Be on time and be prepared to wait. Changes in the legislative calendar and office activity often mean Members and staff must deal with other things.
2. You must be prepared and succinct. *If you do not know the answer, be honest! Always commit to finding out the answer and follow up.*
3. Explain how the particular issue you are discussing affects the Senator's or Representative's state or district with a short anecdote or facts about the district. (e.g., how many people work for your company/university and their economic impact)
4. Limit the presentation; let everyone speak to the issue if they want to contribute.
5. Never be negative about politicians; do not whine or lecture to Members or staffers; do not imply that R&D funding is or should be an entitlement.
6. After the meeting, follow up! Send a letter of thanks to the Member and staffer offering to be a source of information in the future.

#### **Additional Tips for Personal Visits:**

The following suggestions will help make the best use of your time and the legislator's:

1. Always make an appointment. Arranging the first meeting may require patience on your part, but be persistent. Later, as you become known as a resource, gaining appointments will be less difficult. This will occur especially if you also become known as a campaign contributor, political activist, or civic leader who can muster support on the issues from a wide variety of groups through your coalition activities.
2. Be prepared to meet with key legislative personnel or committee staff members if the legislator is unavailable. Briefing these people before your visit also may be useful so that they can prepare the legislator. Staff aides are often more knowledgeable about details of a specific issue than lawmakers themselves.
3. If several individuals join you in the visit, decide in advance who will be the principal spokesperson. That individual, of course, should encourage others to participate in the discussion to share particular expertise or experiences.

4. If you want to discuss a specific issue, make sure you are thoroughly familiar with all aspects of it before going into the meeting.
5. When talking to legislators, try to be concise, well organized, and mindful of the other person's time. State your view firmly, but be attentive to the policy-maker's position also.
6. Open the discussion by reminding the legislator who you are, whom you represent, and why you are there. Know the issue and the bill number. State your concern about the issue, how it will affect you and your organization, and the community. Thank them for meeting with you.
7. Always be truthful and never mislead. Your personal credibility and that of the organization you represent is at stake. If you do not have the answer to a question, do not improvise. Promise to get back to the questioner with the necessary information, and be sure to do so promptly.
8. Come prepared with a brief (one-page) position paper that summarizes your points with facts, and leave it behind with the legislators or staff aides. If a lengthier document or answers to questions is relevant, send it later with a "thank-you" note.
9. To gain a favorable vote, follow up with letter(s) and calls to legislators and their key staff advisors at appropriate points as the issue progresses.
10. Maintain the relationship. Get your name on legislative mailing lists. Find occasions to see the legislators again in appropriate circumstances, and write to them on the issues from time to time. If you obtain reports or data that will be useful to legislators and their aides and that you can share with them, send those documents with a brief personal cover note. Eventually, you may even find policymakers coming to you for information, help, or your point of view on new issues.